



OVERSEAS TRAVELERS TO UTAH

In-Depth Visitor Profile

A profile of overseas visitors to Utah was conducted on behalf of the Utah Travel Council by CIC Research, Inc. using In-Flight Survey Data from ITA Tourism Industries (a division of the U.S. Dept. of Commerce). The profile reflects information gathered from January through December 1997-1999. *The analysis does not include visitors from either Canada or Mexico.* The data revealed two major types of overseas travelers to Utah who were very different in terms of demographic characteristics, travel patterns and purposes and activities.

The groups are identified as visitors to Utah's National Parks (40%) and visitors to Salt Lake City, or the business and ski visitor (32%). Each visitor group has a very different visitor profile. The state's complete profile is more accurately the combination of these two different groups. Each of the three overseas visitor groups (overall, national park and Salt Lake City) is presented in some detail below. A special analysis is also included on the Las Vegas visitor because of the increasing relevance of that growing market to Utah.

Utah's top overseas markets are located in Western Europe and Japan. Germany (23%), France (16%), the United Kingdom (11%), the Benelux countries (10%), Japan (8%) and Italy (6%) represent Utah's top markets. Given existing trends and forecasted growth in international tourism from many regions of the world, Utah anticipates eventual growth in arrivals from several emerging markets, including countries in South America (Brazil and Argentina), Scandinavia, Asia (Korea and Taiwan), Mexico and Australia.

Demographics

- The average age of the overseas visitor to Utah is 42, with nearly 50% of all visitors in the 35-54 age grouping.
- The large majority travel with a spouse (37%) or with other family members (34%). Fewer travel alone (21%) or with friends (15%). However, *90% of all overseas visitors are adults, in contrast to the family-dominated domestic travel market.*
- Over two-thirds of all overseas visitors are men (68%), although since one in five overseas visitors is on a business-related trip, the higher percentage of male visitors is not unexpected.
- Over 22% of all overseas visitors boast annual household incomes of greater than \$100,000. The average household income is \$72,800.

Travel Patterns

- *Roughly two-thirds of overseas visitors to Utah (68%) are repeat visitors to the U.S.*
- The majority of overseas travelers to Utah enter the country through Los Angeles (26%), San Francisco (15%) and New York (10%). Other common ports of entry include Chicago (8%), Detroit (4%), Cincinnati (4%), Washington D.C. (4%) and Atlanta (3%).
- Once in the U.S., most overseas travelers prefer to travel in rental vehicles (58%). Many also take advantage of domestic air transportation (40%).
- The average stay within the U.S. is 23.5 nights, while the Utah portion of the trip averages 5.7 nights.¹

¹ While the average stay in the U.S. is 23.5 nights, there is a significant difference between Western European visitors and Japanese visitors. The Japanese visitor spends 12.7 nights in the U.S. as opposed to the 18-25 nights spent in the U.S. by European travelers. In relative terms, the Japanese visitor dedicates a greater portion of his/her trip to Utah.

- On average, the overseas visitor will visit 3.8 states and 5.3 specific destinations while on their trip to the U.S. Besides Utah, other common destinations include California (San Francisco, Los Angeles, Yosemite and San Diego), Nevada (Las Vegas), Arizona (Grand Canyon, Phoenix), Colorado and Wyoming (Yellowstone).
- Within the state, Salt Lake City is visited by nearly a third of all overseas visitors (32%). Other commonly visited destinations include Bryce Canyon National Park (25%), Zion National Park (13%), Monument Valley Navajo Tribal Park (12%) and Glen Canyon National Recreation Area (5%).
- Over three-fourths (76%) of overseas travelers stay in hotels or motels with the remainder split between private homes and camping.
- The average overseas visitor spends \$81 per day.
- On average, the trip decision is made approximately four months in advance (120 days), with air reservations and other arrangements made closer to the departure dates.
- The most common sources of information include travel agencies (65%), travel guides (25%), friends and relatives (24%), state or city travel offices (15%), personal computers (12%) and airlines (11%).
- Only 30% of overseas travelers indicated they had purchased a vacation package, with the most frequent type of package including air and lodging. Other common packages include guided tours or air and car rentals.

Travel Purposes and Activities

- The majority of overseas travelers to Utah arrive for leisure purposes (81%), including 10% who arrive to visit friends and relatives. The remaining 19% is comprised of business trips, convention activity and studying or teaching trips.
- The most common activity for overseas visitors to Utah is shopping (86%) and dining (81%). National Parks (78%), sightseeing in cities (58%), historic places (55%), touring the countryside (54%) and visiting small towns (51%) are also popular activities among Utah's overseas travelers.
- *Compared to national averages, the overseas visitor to Utah is more than twice as likely to visit Native American communities, camp or hike, visit national parks, gamble, snow ski, participate in environmental or eco excursions, tour the countryside and visit ethnic, cultural or heritage sites.*
- Utah overseas visitors are less likely than the average U.S. overseas visitor to play golf or tennis, go on cruises, participate in water sports or sunbathe, shop or dine in restaurants.

OVERSEAS VISITORS TO UTAH SUMMARY - 1997-1999*

Utah Division of Travel Development

DEMOGRAPHICS

AGE (years)

| | |
|--------------------|------|
| Average Age (mean) | 42.2 |
| 18-34 Years | 34% |
| 35-54 Years | 48% |
| 55+ Years | 18% |

HOUSEHOLD INCOME (\$US)

| | |
|----------------------|----------|
| Average HH Income | \$72,800 |
| < \$40,000 | 27% |
| \$40,000 - \$80,000 | 39% |
| \$80,000 - \$120,000 | 19% |
| \$120,000+ | 15% |

PARTY COMPOSITION

| | |
|--------------------------|-----|
| Avg. Travel Party (mean) | 1.9 |
| Spouse | 37% |
| Family/Relatives | 34% |
| Traveling Alone | 21% |
| Friends | 15% |
| Business Associates | 6% |
| Group Tour | 5% |
| Adults Only | 90% |
| Adults and Children | 10% |

GENDER

| | |
|-------|-----|
| Men | 68% |
| Women | 32% |

FREQUENT TRAVELERS

| | |
|----------------------------|-----|
| Repeat Visitor to the U.S. | 68% |
| U.S. Trips last 12 Months | 1.6 |
| U.S. Trips last 5 Years | 4.0 |
| 1 Trip | 41% |
| 2 - 5 Trips | 41% |
| 5+ Trips | 18% |

ORIGIN MARKETS (1999 only)

| | |
|---------------|-----|
| Germany | 23% |
| France | 16% |
| U.K. | 11% |
| Benelux | 10% |
| Japan | 8% |
| Italy | 6% |
| Switzerland | 5% |
| Oceania | 4% |
| Scandinavia | 3% |
| South America | 3% |

PORT OF ENTRY

| | |
|---------------|-----|
| Los Angeles | 26% |
| San Francisco | 15% |
| New York | 10% |
| Chicago | 8% |
| Detroit | 4% |
| Cincinnati | 4% |

TRAVEL PATTERNS

ADVANCE TRIP PLANNING

| | |
|---------------------------|----------|
| Advance Trip Decision | 120 Days |
| Advance Air Reservations | 77 Days |
| Use of Pre-Booked Lodging | 66% |

USE OF PACKAGES

| | |
|---|---------|
| YES | 30% |
| Air/Lodging | 18% |
| Guided Tour | 15% |
| Air/Rental Car | 12% |
| Air/Lodging/Tour | 9% |
| Air/Lodging/Rental Car | 8% |
| Air/Lodging/Bus | 7% |
| Air/Lodging/Bus/Tour | 6% |
| Advance Package Booking | 93 Days |
| # of Nights Pre-paid as Part of a Package | 12.8 |

INFORMATION SOURCES

| | |
|--------------------------|-----|
| Travel Agency | 65% |
| Travel Guides | 25% |
| Friends/Relatives | 24% |
| State/City Travel Office | 15% |
| Personal Computer | 12% |
| Airlines Directly | 11% |
| Tour Company | 9% |
| Newspapers/Magazines | 9% |
| Other | 10% |

EXPENDITURES

| | |
|--|------|
| Avg. Spending Per-Visitor-Per-Day (mean) | \$81 |
|--|------|

ACCOMMODATIONS

| | |
|--------------|-----|
| Hotel/Motel | 76% |
| Private Home | 13% |
| Other | 14% |

TRANSPORTATION IN U.S.

| | |
|-------------------------|-----|
| Rented Auto | 58% |
| Airlines in U.S. | 40% |
| Taxi/Cab/Limousine | 27% |
| Company or Private Auto | 23% |
| City Subway/Tram/Bus | 17% |

LENGTH OF STAY

| | |
|----------------------------|------|
| # of Nights In Utah (mean) | 5.7 |
| # of Nights in US (mean) | 23.5 |

UTAH DESTINATIONS VISITED

| | |
|-------------------|-----|
| Salt Lake City | 32% |
| Bryce Canyon N.P. | 25% |
| Zion N.P. | 13% |
| Monument Valley | 12% |
| Glen Canyon | 5% |

PURPOSE/ACTIVITIES

PURPOSE OF TRIP

| | |
|-------------------------|-----|
| Leisure & VFR | 81% |
| Leisure/Rec./Holidays | 70% |
| Visit Friends/Relatives | 10% |
| Other | 1% |
| Business & Convention | 19% |
| Business/Professional | 13% |
| Convention/Conference | 5% |
| Study/Teaching | 2% |

OTHER DESTINATIONS VISITED

| | |
|---------------------------|-----|
| # of States Visited | 3.8 |
| # of Destinations Visited | 5.3 |
| California | 70% |
| San Francisco | 42% |
| Los Angeles | 40% |
| Yosemite N.P. | 13% |
| San Diego | 11% |
| Nevada | 58% |
| Las Vegas | 53% |
| Arizona | 55% |
| Grand Canyon N.P. | 32% |
| Phoenix | 10% |
| Colorado | 12% |
| Wyoming | 12% |
| Yellowstone N.P. | 9% |

LEISURE ACTIVITIES

| | |
|----------------------------|-----|
| Shopping | 86% |
| Dining in Restaurants | 81% |
| Visit National Parks | 78% |
| Sightseeing in Cities | 58% |
| Visit Historic Places | 55% |
| Touring Countryside | 54% |
| Visit Small Towns | 51% |
| Amusement/Theme Parks | 46% |
| Casinos/Gambling | 45% |
| Cultural or Heritage Sites | 38% |
| Visit Am. Indian Comm. | 32% |
| Guided Tours | 26% |
| Art Gallery/Museum | 24% |
| Water Sports/Sunbathing | 22% |
| Camping/Hiking | 21% |
| Concert/Play/Musical | 13% |
| Environ./Eco Excursions | 11% |
| Nightclubs/Dancing | 9% |
| Attend Sports Event | 7% |
| Snow Skiing | 6% |
| Golfing/Tennis | 5% |
| Cruises | 4% |
| Ranch Vacations | 2% |
| Hunting/Fishing | 2% |

VISITATION VOLUME (1999 only)

| | |
|--------------------------------|-----|
| Total Int'l. Visitation (000s) | 700 |
|--------------------------------|-----|

*SOURCE: U.S. Department of Commerce, ITA/Tourism Industries